

MFS® 529 SAVINGS PLAN INCOMING ROLLOVER FORM



Rollover Checklist

- Contact your current program manager and determine whether they require a medallion signature guarantee for rollover requests.
- Complete **Sections 1 through 5, and 6** if required by your current program manager.
- If the rollover is going into a new account, mail this completed form along with a completed MFS 529 Savings Plan application and most recent statement of current account to the address in **Step 3**.

1. Account Information

ACCOUNT OWNER'S FIRST NAME

MI

LAST NAME

- -

SOCIAL SECURITY NUMBER

DESIGNATED BENEFICIARY'S FIRST NAME

MI

LAST NAME

- -

SOCIAL SECURITY NUMBER

3. Transmittal Instructions

NAME OF CURRENT PROGRAM MANAGER/CUSTODIAN _____

ADDRESS _____

CITY _____

STATE _____

ZIP CODE _____

□ □ □ - □ □ □ - □ □ □ □

PHONE NUMBER

Important: Liquidate all or a portion of the below accounts.

ACCOUNT /FUND NUMBER	AMOUNT	SELECT ONE:		
		PERCENTAGE	DOLLARS	ALL
_____	_____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
_____	_____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
_____	_____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
_____	_____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Make check payable to:

MFS 529 Savings Plan (Name of the Account Owner), FBO (Name of the Designated Beneficiary)

Please include the MFS account number or Designated Beneficiary's Social Security number.

If you have any questions about this form, please contact the MFS 529 Savings Plan Service Team at 1-888-529-0063 Monday - Friday 8AM - 7PM ET. Upon receipt, the Current Program Manager should mail this completed form and check to:

Regular mail
 MFS 529 Savings Plan
 PO Box 534454
 Pittsburgh, PA 15253- 4454

Overnight mail
 MFS 529 Savings Plan
 Attention: 534454
 500 Ross Street, 154-0520
 Pittsburgh, PA 15262

4. Basis and Earnings

Provide a breakdown of the basis (contributions) and earnings below. A statement that shows the basis (contributions) and earnings portion of the rollover must be included.

\$ _____
 BASIS (CONTRIBUTIONS)

\$ _____
 EARNINGS

Contributions and rollovers will be accepted only to the extent that they do not exceed the maximum limit described in the MFS 529 Savings Plan Participant Agreement and Disclosure Statement. If a transaction statement is not provided, the rollover contribution will be classified as 100% earnings.

5. Account Owner's Signature

SIGNATURE

DATE (MM/DD/YYYY)

PRINT NAME

6. Authorization to Roll Over

Important: Contact your current program manager to see if a signature/medallion guarantee stamp or other documentation is required to proceed. Space is provided below for a signature/medallion guarantee stamp, if required.

AFFIX GUARANTEE STAMP HERE



MFS® 529 SAVINGS PLAN

INVESTMENT OPTIONS



CLASS A

Enrollment year investment options that correspond with the beneficiary's expected college enrollment date.

BIRTH RANGE	FUND NAME	FUND NUMBER
9/1/1999 TO 8/31/2000	ENROLLMENT YEAR 2018 FUND	1002
9/1/2000 TO 8/31/2001	ENROLLMENT YEAR 2019 FUND	1003
9/1/2001 TO 8/31/2002	ENROLLMENT YEAR 2020 FUND	1004
9/1/2002 TO 8/31/2003	ENROLLMENT YEAR 2021 FUND	1005
9/1/2003 TO 8/31/2004	ENROLLMENT YEAR 2022 FUND	1006
9/1/2004 TO 8/31/2005	ENROLLMENT YEAR 2023 FUND	1007
9/1/2005 TO 8/31/2006	ENROLLMENT YEAR 2024 FUND	1008
9/1/2006 TO 8/31/2007	ENROLLMENT YEAR 2025 FUND	1009
9/1/2007 TO 8/31/2008	ENROLLMENT YEAR 2026 FUND	1010
9/1/2008 TO 8/31/2009	ENROLLMENT YEAR 2027 FUND	1011
9/1/2009 TO 8/31/2010	ENROLLMENT YEAR 2028 FUND	1012
9/1/2010 TO 8/31/2011	ENROLLMENT YEAR 2029 FUND	1013
9/1/2011 TO 8/31/2012	ENROLLMENT YEAR 2030 FUND	1014
9/1/2012 TO 8/31/2013	ENROLLMENT YEAR 2031 FUND	1015
9/1/2013 TO 8/31/2014	ENROLLMENT YEAR 2032 FUND	1016
9/1/2014 TO 8/31/2015	ENROLLMENT YEAR 2033 FUND	1017
9/1/2015 TO 8/31/2016	ENROLLMENT YEAR 2034 FUND	1018
9/1/2016 TO 8/31/2017	ENROLLMENT YEAR 2035 FUND	1019
9/1/2017 TO 8/31/2018	ENROLLMENT YEAR 2036 FUND	1020
9/1/2018 TO 8/31/2019	ENROLLMENT YEAR 2037 FUND	1021
9/1/2019 TO 8/31/2020	ENROLLMENT YEAR 2038 FUND	1022
9/1/2020 TO 8/31/2021	ENROLLMENT YEAR 2039 FUND	1023
9/1/2021 TO 8/31/2022	ENROLLMENT YEAR 2040 FUND	1024
9/1/2022 TO 8/31/2023	ENROLLMENT YEAR 2041 FUND	1025
9/1/2023 TO 8/31/2024	ENROLLMENT YEAR 2042 FUND	1033

The following risk-based fund investments are also available.

RISK-BASED FUND NAME	FUND NUMBER
AGGRESSIVE GROWTH ALLOCATION FUND	1026
GROWTH ALLOCATION FUND	1027
MODERATE ALLOCATION FUND	1028
CONSERVATIVE ALLOCATION FUND	1029
LIFETIME INCOME FUND	1030
LIMITED MATURITY FUND	1031
US GOVT CASH RESERVE FUND	1032

MFS® 529 SAVINGS PLAN

INVESTMENT OPTIONS



CLASS I

Enrollment year investment options that correspond with the beneficiary's expected college enrollment date.

BIRTH RANGE	FUND NAME	FUND NUMBER
9/1/1999 TO 8/31/2000	ENROLLMENT YEAR 2018 FUND	8002
9/1/2000 TO 8/31/2001	ENROLLMENT YEAR 2019 FUND	8003
9/1/2001 TO 8/31/2002	ENROLLMENT YEAR 2020 FUND	8004
9/1/2002 TO 8/31/2003	ENROLLMENT YEAR 2021 FUND	8005
9/1/2003 TO 8/31/2004	ENROLLMENT YEAR 2022 FUND	8006
9/1/2004 TO 8/31/2005	ENROLLMENT YEAR 2023 FUND	8007
9/1/2005 TO 8/31/2006	ENROLLMENT YEAR 2024 FUND	8008
9/1/2006 TO 8/31/2007	ENROLLMENT YEAR 2025 FUND	8009
9/1/2007 TO 8/31/2008	ENROLLMENT YEAR 2026 FUND	8010
9/1/2008 TO 8/31/2009	ENROLLMENT YEAR 2027 FUND	8011
9/1/2009 TO 8/31/2010	ENROLLMENT YEAR 2028 FUND	8012
9/1/2010 TO 8/31/2011	ENROLLMENT YEAR 2029 FUND	8013
9/1/2011 TO 8/31/2012	ENROLLMENT YEAR 2030 FUND	8014
9/1/2012 TO 8/31/2013	ENROLLMENT YEAR 2031 FUND	8015
9/1/2013 TO 8/31/2014	ENROLLMENT YEAR 2032 FUND	8016
9/1/2014 TO 8/31/2015	ENROLLMENT YEAR 2033 FUND	8017
9/1/2015 TO 8/31/2016	ENROLLMENT YEAR 2034 FUND	8018
9/1/2016 TO 8/31/2017	ENROLLMENT YEAR 2035 FUND	8019
9/1/2017 TO 8/31/2018	ENROLLMENT YEAR 2036 FUND	8020
9/1/2018 TO 8/31/2019	ENROLLMENT YEAR 2037 FUND	8021
9/1/2019 TO 8/31/2020	ENROLLMENT YEAR 2038 FUND	8022
9/1/2020 TO 8/31/2021	ENROLLMENT YEAR 2039 FUND	8023
9/1/2021 TO 8/31/2022	ENROLLMENT YEAR 2040 FUND	8024
9/1/2022 TO 8/31/2023	ENROLLMENT YEAR 2041 FUND	8025
9/1/2023 TO 8/31/2024	ENROLLMENT YEAR 2042 FUND	8033

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CONSERVATIVE ALLOCATION FUND	8029
LIFETIME INCOME FUND	8030
LIMITED MATURITY FUND	8031
US GOVT CASH RESERVE FUND	8032